

TAX DOCUMENTS CHECKLIST

Grayson County Alliance (VITA) Volunteer Income Tax Assistance Free Tax Site

Picture ID for Self and Spouse, check expiration dates **REQUIRED**
Social Security Cards or Individual Tax ID Numbers for **EVERYONE** on your Tax
Return **REQUIRED**

Income Documentation:

- W2's
- 1099-INT, 1099-DIV, 1099-R, 1099-MISC
- Unemployment
- Social Security
- Alimony: Divorces Pre 2020
- Sales of Stocks
- Cash Income
- Scholarships

Deductions & Expenses Documentation:

- Property Taxes
- Home Mortgage Interest
- Medical Expenses
- Charitable Contributions
- Student Loan Interest
- Divorces Pre 2020 Alimony Paid
- Unreimbursed Educators Expense
- Self-Employment Expenses, etc.

Documentation for Tax Credits

- Statement from Child and Dependent Care Provider with Federal Tax ID#
- Proof of Tuition Expenses 1098-T
- Receipts for Energy Efficient Upgrade to Main Home

Health Insurance Statement (FORM 1095-A)

*** Health Insurance: DID YOU or ANY PERSON ON YOUR TAX RETURN, PURCHASE HEALTH INSURANCE THROUGH KYNECT OR HEALTHCARE.GOV? A copy of the 1095A is REQUIRED to prepare your taxes. Your tax return will reject from the IRS without the 1095A.**

If Possible : A copy of last year's income tax return.

For Direct Deposit (the fastest and safest way to receive your refund): Documentation of personal Checking and Savings Accounts with Bank Routing Numbers.

GCA VITA Site sponsored by:



GRABC

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